

NC eProcurement

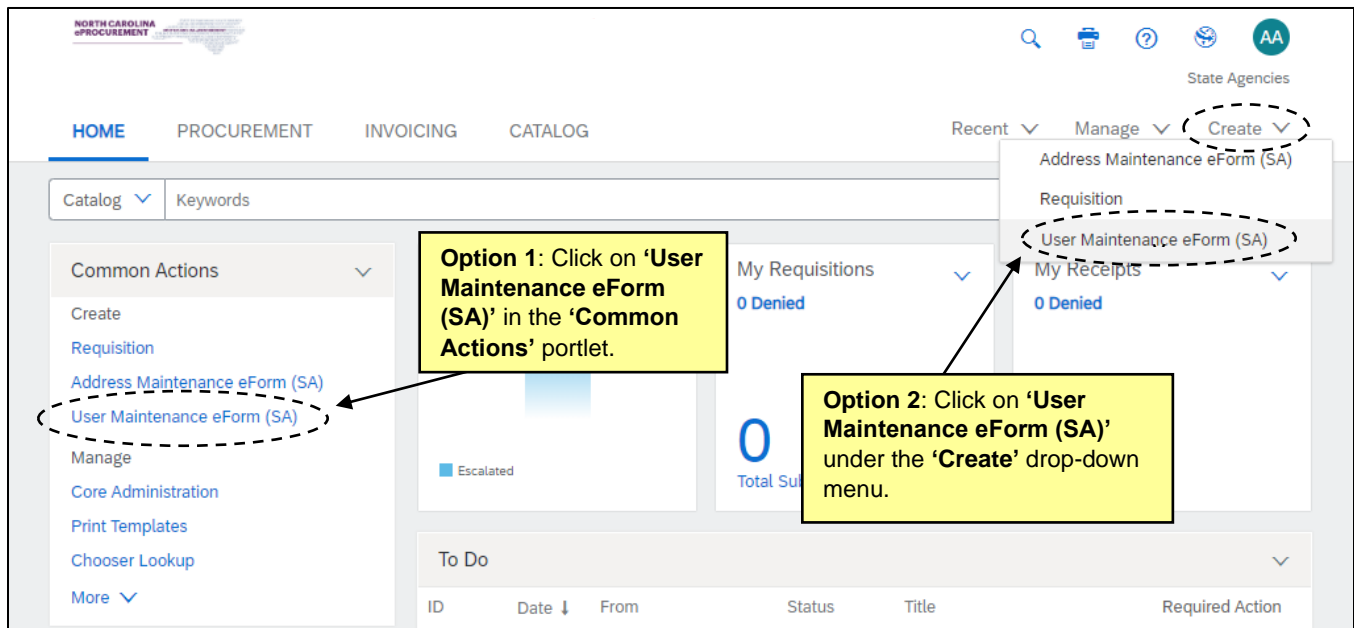
Security Administrator

Security Administrators within each entity have the ability to directly update user and address information within NC eProcurement. To do so, Security Administrators use electronic forms within the tool called eForms. These eForms are easy-to-use pages accessible from the **'Create'** shortcut menu. Only Security Administrators, Community College/School System EP Lite Administrators, and users belonging to the **'NC User Maintenance eForm'** or **'NC Address Maintenance eForm'** groups have access to the eForms. This process guide will show Security Administrators how to conduct User Maintenance, Address Maintenance, and Reassign Transactions between users.

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I. User Maintenance

1. User Maintenance can only be accessed and completed through the Expert View of NC eProcurement. There is no way to access the User Maintenance eForm through the Guided Buying View.
2. To access the User Maintenance eForm, select '**User Maintenance eForm (SA)**' from the '**Common Actions**' portlet or from the '**Create**' menu.



This brings up the User Maintenance eForm page.

3. Begin by entering a title for the User Maintenance request (e.g. 'New User – John Doe').

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- Next, select the action to take by choosing from the '**Select Maintenance Mode**' drop-down menu. The Security Administrator can choose to **Add**, **Update**, or **Delete** a user.

Enter a title for the User Maintenance request here.

Use the drop-down menu to determine which action to take.

- Next, select which Module the request is for. For procurement related activities, select '**Buying.**'
- Enter the NCID of the user for the action and click the blue '**Search**' button.

Notes:

- Users must have an active NCID User ID set up before they can be added, updated, or deleted from NC eProcurement through the User Maintenance eForm.
- An error message of '**Invalid NCID**' indicates that the NCID user does not exist.
- An error message of '**Disabled/Deactivated User**' indicates that the NCID user has already been deactivated.
- If the NCID is associated to an Individual or Business account, the Security Administrator will see an error message stating, '**Only a State or Local NCID account may be used with NCEP.**' NCID may be accessed by visiting <https://ncid.nc.gov>.

7. Entering a valid NCID will automatically populate the NCID Name and Email Address fields.

a. Adding A User

1. To add a new user to NC eProcurement, select '**Add**' on the '**Select Maintenance Mode**' drop-down on the **User Maintenance eForm** page.
2. Enter the NCID of the user for the action and click the blue '**Search**' button.
3. After selecting a valid NCID, fill in the necessary information for the new user's profile. The new user's Entity, Supervisor, Buying Entity, and Groups will not be scoped by the Entity of the Security Administrator and must be manually selected.

- a. **Entity:** This field is for the State Agency, Community College, LEA, or Local Government that the new user belongs to.

Note: A Security Administrator may request for a new user to be added to a different entity than their own. This request will result in the NC eProcurement Help Desk manually verifying that the user has Cross-Entity access.

- b. **Management Level:** The management level field determines the new user's Purchase Requisition approval flow.

Note: A management level of '**0**' indicates that all Purchase Requisitions for the new user will require supervisor approval. A management level of '**9999999**' indicates that no supervisor approval is required for Purchase Requisitions.

- c. **Supervisor:** Select the new user's NC eProcurement supervisor. Depending on the user's management level, the selected supervisor will have to approve Purchase Requisitions entered by the new user.

- d. **Buying Entity (NCAS Users Only):** Select the default Buying Entity specific to this user.
- e. **User Group:** This field is for approval flow purposes and is only required for Entity 13 – Department of Administration, Entity 08 – Department of Public Instruction, and Entity 2B – Division of Public Health. This field enables users to specify an additional level of hierarchy within the entity (e.g. A user who works for the Office of State Personnel would belong to Entity 13 – Department of Administration with a User Group of **'OSPN'**. For more information please contact the NC eProcurement Help Desk.)
- f. **Groups:** Select the appropriate groups to which the new user must belong. Groups are entity-specific roles that are used in setting up entity specific approval flows, as well as permissions for increased capabilities such as Collaborative Requisitions or Global Reporting. Users can be added to multiple groups. See **Section IV. Group Definitions** for a list of groups and their descriptions.

Note: For additional assistance with the correct groups to have for a user, contact the NC eProcurement Help Desk.

The screenshot shows a form for creating a new user. The form includes the following fields and annotations:

- Entity:** 13 - Department of Administration
- Management Level:** 9999999 (Annotated: A user's management level determines at what dollar amount their Purchase Requisition requires a supervisor's approval.)
- Supervisor:** ADMIN Purchasing Agent
- Buying Entity:** 13EG (Annotated: 'Buying Entity' is only required for NCAS users, and 'User Group' is only required for DOA, DPI and Division of Public Health.)
- User Group:** ADMN
- Groups:** NC Global Reporting Role, NC NCAS Basic User (Annotated: Users can be added to multiple groups as necessary.)
- Approval Flow:** A flow diagram showing a play button icon, a box labeled 'N NC Help Desk', and a checkmark icon.
- Watches:** A section for adding watchers.
- Buttons:** Cancel, Save, and Submit.

4. Once all the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (labeled as **'NC Help Desk'**) for review and approval.
5. Click **'Submit'** to request the new user.

Note: At any time when creating a User Maintenance eForm, the Security Administrator may opt to save the request to submit at a later time by clicking the **'Save'** button at the bottom of the screen.

- After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.
- Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

b. Updating A User

- To update an existing user in NC eProcurement, select **'Update'** on the **'Select Maintenance Mode'** drop-down on the **User Maintenance eForm** page.
- Although the user already exists within NC eProcurement, entering their NCID will not automatically populate their Entity, Management Level, Supervisor, Buying Entity, or User Group.
- Enter the required information including any changes that must be submitted (e.g. keeping a user's Entity, Supervisor, and Buying Entity the same but increasing the user's Management Level).
- To update the Groups associated to the user, select the **'Remove'** or **'Add'** checkbox next to the **'Update Group'** option. These check boxes will bring up separate fields for the Security Administrator to choose groups to add and groups to remove.

NC eProcurement Security Administrator

User Maintenance eForm (SA) New Cancel Save Submit

Add, update, or delete a User.

Title: * Update User

Select Maintenance Mode: * Update

NCID User ID ncep.state

Selecting the check box for 'Remove' or 'Add' will bring up separate fields to enter which groups the user should be added to or removed from.

Basic user information will not automatically populate based on the existing user's NCID. See note below.

Entity: * 13 - Department of Administration ✕

Management Level: * 0

Supervisor: * ADMIN Purchasing Agent ✕

Buying Entity: * 13EG ✕

User Group: * ADMN

Update Group: ☒ Remove ☒ Add

Remove Groups: * Select Groups to be removed from th... ✕

Add Groups: * Select Groups to be added to the User. ✕

Search

Approval

Changes to the form may affect the approval process. Click the refresh icon to see the most current process.

▶ N NC Help Desk

Note: When removing groups from an existing user, the 'Remove Groups' field will not display which groups the user is currently in. To determine which groups the user is already in, the existing user will need to view that information within their User Profile and inform the Security Administrator. Alternatively, the Security Administrator can request that information from the NC eProcurement Help Desk.

9. Once all the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (**NC Help Desk**) for review and approval.
10. Click 'Submit' to request that the NC eProcurement Help Desk update the existing user's information in the system.
11. After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

- Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

c. Deleting A User

- To delete an existing user in NC eProcurement, select **'Delete'** on the **'Select Maintenance Mode'** drop-down on the **User Maintenance eForm** page.
- No additional information is required to delete a user besides the **'Title'**, **'Select Maintenance Mode'**, **'Module'**, and the **NCID**.
- Once the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (**NC Help Desk**) for review and approval.

- Click **'Submit'** to request that the NC eProcurement Help Desk delete the existing user's information in the system.

Note: All transactions created by the user must be in a completed state before the user can be deleted. For NCAS users, all purchase orders must be **'Received,' 'Cancelled,'** or in **'Ordered'** status with a quantity of zero. All transactions with a **'Composing,' 'Denied,' 'Submitted,'** or **'Failed'** status must be resolved before the user can be deleted and should be resolved before the NCID User ID is inactivated within the NCID system. For more information on reassigning transactions from one user to another, see **Section III. Reassigning Transactions.**

- After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.
- Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request. If complete, select the **'Exit'** button.

The screenshot shows a section titled 'Comments' with a text area for adding comments. A dashed oval highlights the 'Add comments' text area and the 'Add' button below it. A yellow callout box points to this area with the text: 'Users may add comments to their request if necessary.' Another yellow callout box points to the 'Withdraw' button at the bottom right of the screen with the text: 'To withdraw a request, click the **'Withdraw'** button at the bottom of the screen.' The 'Exit' button is also visible next to the 'Withdraw' button.

II. Address Maintenance

- Address Maintenance can only be accessed and completed through the Expert View of NC eProcurement. There is no way to access the Address Maintenance eForm through the Guided Buying View.
- To access the Address Maintenance eForm, select **'Address Maintenance eForm (SA)'** from the **'Common Actions'** portlet or from the **'Create'** menu.

The screenshot shows the NC eProcurement interface. On the left, there is a 'Common Actions' portlet with a dropdown menu. A dashed oval highlights the 'Address Maintenance eForm (SA)' option. A yellow callout box points to this option with the text: 'Option 1: Click on **'Address Maintenance eForm (SA)'** in the **'Common Actions'** portlet.' On the right, there is a 'Create' dropdown menu. A dashed oval highlights the 'Address Maintenance eForm (SA)' option. A yellow callout box points to this option with the text: 'Option 2: Click on **'Address Maintenance eForm (SA)'** under the **'Create'** drop-down menu.'

3. This brings up the Address Maintenance eForm page.
4. Begin by entering a title for the Address Maintenance request (e.g. 'Add Address – New Ship To').
5. Next, select the action to take by choosing from the '**Select Maintenance Mode**' drop-down menu. The Security Administrator can choose to **Add, Delete, Update, or Reactivate** an address.

a. Adding an Address

1. To add an address, select '**Add**' from the '**Select Maintenance Mode**' drop-down menu on the Address Maintenance eForm. Security Administrators must then add the following required fields:
 - a. **Address Name:** The name of the address will be used in User Profiles and Purchase Requisitions to quickly find the appropriate address (e.g. 'Main Office').
 - b. **Entity:** The entity which the address will be added to. This field will not default to the Security Administrator's entity. If an entity is entered in this field that is outside the Security Administrator's entity, the NC eProcurement Help Desk will manually verify that the Security Administrator has cross entity permissions.
 - c. **Line 1:** The mailing address information for the address being added. Lines 2 and 3 are not required but may be used for additional details.
 - d. **City:** Enter the city name.
 - e. **State:** Enter '**NC**' for the two-digit state abbreviation.
 - f. **Postal Code:** Enter the zip code of the location. Do not hyphenate the full 9-digit code.
 - g. **Ship To, Bill To:** Select from the drop-down menu whether the new address will be a 'Ship To' address for goods to be delivered, or a 'Bill To' address for invoices.

Notes:

- Local school systems (LEAs) will see an additional field titled, '**LEA Address ID**' which is a required field. This information is required to complete the address mapping process. If an

LEA receives an error message when attempting to add or update an Address ID that was previously deleted, the address will first need to be reactivated.

- Additional non-required fields are available for Security Administrators to add a more detailed address (e.g. Suite 500), an email address, a phone number, a fax number, and a website URL to be associated with the address. This information will be on the Purchase Orders to provide additional contact information for Vendors to reach out to.

Address Maintenance eForm (SA) New

Cancel Save Submit

Add, Delete, Update, or Reactivate address.

Title: Add New Ship-To Address

Select Maintenance Mode: Add

Address Name: NCEP Ship-To #2

Entity: 13 - Department of Administration *

Line 1: 123 Main Street

Line 2:

Line 3:

City: Raleigh

State: NC

Postal Code: 26701

Country: US

Email Address:

Phone:

Fax:

URL:

ShipTo, BillTo: ShipTo *

Required information for adding an address is denoted by the (*) symbol.

Approval

Changes to the form may affect the approval process. Click the refresh icon to see the most current process.

NC Help Desk

- Once all the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (**NC Help Desk**) for review and approval.
- Click **'Submit'** to request that the NC eProcurement Help Desk add the address' information in the system.
- After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

- Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request.

Comments

No comments have been made.

Add comments

Add

Maximum 2048 characters

Users may add comments to their request if necessary.

To withdraw a request, click the **'Withdraw'** button at the bottom of the screen.

Withdraw

Exit

b. Deleting an Address

- To delete an address, select **'Delete'** from the **'Select Maintenance Mode'** drop-down menu on the Address Maintenance eForm. Security Administrators must then add the following required fields:
 - Address Name:** The name of the address will be used in User Profiles and Purchase Requisitions to quickly find the appropriate address (e.g. 'Main Office').
 - Entity:** The entity which the address will be deleted from. This field will not default to the Security Administrator's entity. If an entity is entered in this field that is outside the Security Administrator's entity, the NC eProcurement Help Desk will manually verify that the Security Administrator has cross entity permissions.
 - Line 1:** The mailing address information for the address being added. Lines 2 and 3 are not required but may be used for additional details.
 - City:** Enter the city name.
 - State:** Enter **'NC'** for the two-digit state abbreviation.
 - Postal Code:** Enter the zip code of the location. Do not hyphenate the full 9-digit code.
 - Ship To, Bill To:** Select from the drop-down menu whether the new address will be a 'Ship To' address for goods to be delivered, or a 'Bill To' address for invoices.

Notes:

- Local school systems (LEAs) will see an additional field titled, **'LEA Address ID'** which is a required field. This information is required to complete the address mapping process. If an LEA receives an error message when attempting to add or update an Address ID that was previously deleted, the address will first need to be reactivated.
- The **'Address Unique Name'** field is not required but may be used to help identify the address. Different addresses may be saved with the same name (e.g. 'Main Office') however each address has a unique ID which allows the NC eProcurement Help Desk to quickly verify the address for deleting.

- Additional non-required fields are available for Security Administrators to add a more detailed address (e.g. Suite 500), an email address, a phone number, a fax number, and a website URL to be associated with the address.

Address Maintenance eForm (SA) New Cancel Save Submit

Add, Delete, Update, or Reactivate address.

Title:

Select Maintenance Mode:

Address Unique Name:

Address Name:

Entity:

Line 1:

Line 2:

Line 3:

City:

State:

Postal Code:

Country:

Email Address:

Phone:

Fax:

URL:

ShipTo, BillTo:

> Approval

Cancel Save Submit

Required information for adding an address is denoted by the (*) symbol.

- Once all the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (**NC Help Desk**) for review and approval.
- Click **'Submit'** to request that the NC eProcurement Help Desk delete the existing address' information in the system.
- After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

- Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request.

Comments

No comments have been made.

Add comments

Add

Maximum 2048 characters

Users may add comments to their request if necessary.

To withdraw a request, click the **'Withdraw'** button at the bottom of the screen.

Withdraw

Exit

c. Updating an Address

- To update an address, select **'Update'** from the **'Select Maintenance Mode'** drop-down menu on the Address Maintenance eForm. Security Administrators must then add the following required fields:
 - Address Name:** The name of the address will be used in User Profiles and Purchase Requisitions to quickly find the appropriate address (e.g. 'Main Office').
 - Entity:** The entity which the address will be updated for. This field will not default to the Security Administrator's entity. If an entity is entered in this field that is outside the Security Administrator's entity, the NC eProcurement Help Desk will manually verify that the Security Administrator has cross entity permissions.
 - Line 1:** The mailing address information for the address being added. Lines 2 and 3 are not required but may be used for additional details.
 - City:** Enter the city name.
 - State:** Enter **'NC'** for the two-digit state abbreviation.
 - Postal Code:** Enter the zip code of the location. Do not hyphenate the full 9-digit code.
 - Ship To, Bill To:** Select from the drop-down menu whether the new address will be a 'Ship To' address for goods to be delivered, or a 'Bill To' address for invoices.

Notes:

- Local school systems (LEAs) will see an additional field titled, **'LEA Address ID'** which is a required field. This information is required to complete the address mapping process. If an LEA receives an error message when attempting to add or update an Address ID that was previously deleted, the address will first need to be reactivated.
- The **'Address Unique Name'** field is not required but may be used to help identify the address. Different addresses may be saved with the same name (e.g. 'Main Office') however each address has a unique ID which allows the NC eProcurement Help Desk to quickly verify the address for deleting.

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- Additional non-required fields are available for Security Administrators to add a more detailed address (e.g. Suite 500), an email address, a phone number, a fax number, and a website URL to be associated with the address.

Address Maintenance eForm (SA) New

Cancel Save Submit

Add, Delete, Update, or Reactivate address.

Title: Update Address #1

Select Maintenance Mode: * Update

Address Unique Name:

Address Name: * NCEP Ship-To #2

Entity: * 13 - Department of Administration *

Line 1: * 123 Main Street

Line 2:

Line 3:

City: * Raleigh

State: * NC

Postal Code: * 27601

Country: US

Email Address:

Phone:

Fax:

URL:

ShipTo, BillTo: * ShipTo

> Approval

Cancel Save Submit

Required information for adding an address is denoted by the (*) symbol.

- Once all the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (**NC Help Desk**) for review and approval.
- Click '**Submit**' to request that the NC eProcurement Help Desk update the existing address' information in the system.
- After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

- Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request.

Comments

No comments have been made.

Add comments

Add

Maximum 2048 characters

Users may add comments to their request if necessary.

To withdraw a request, click the **'Withdraw'** button at the bottom of the screen.

Withdraw

Exit

d. Reactivating an Address

- To reactivate an address, select **'Reactivate'** from the **'Select Maintenance Mode'** drop-down menu on the Address Maintenance eForm. Security Administrators must then add the following required fields:
 - Address Name:** The name of the address will be used in User Profiles and Purchase Requisitions to quickly find the appropriate address (e.g. 'Main Office').
 - Entity:** The entity which the address will be reactivated for. This field will not default to the Security Administrator's entity. If an entity is entered in this field that is outside the Security Administrator's entity, the NC eProcurement Help Desk will manually verify that the Security Administrator has cross entity permissions.
 - Line 1:** The mailing address information for the address being added. Lines 2 and 3 are not required but may be used for additional details.
 - City:** Enter the city name.
 - State:** Enter **'NC'** for the two-digit state abbreviation.
 - Postal Code:** Enter the zip code of the location. Do not hyphenate the full 9-digit code.
 - Ship To, Bill To:** Select from the drop-down menu whether the new address will be a 'Ship To' address for goods to be delivered, or a 'Bill To' address for invoices.

Notes:

- Local school systems (LEAs) will see an additional field titled, **'LEA Address ID'** which is a required field. This information is required to complete the address mapping process. If an LEA receives an error message when attempting to add or update an Address ID that was previously deleted, the address will first need to be reactivated.
- The **'Address Unique Name'** field is not required but may be used to help identify the address. Different addresses may be saved with the same name (e.g. 'Main Office') however each address has a unique ID which allows the NC eProcurement Help Desk to quickly verify the address for deleting.

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Security Administrator

- Additional non-required fields are available for Security Administrators to add a more detailed address (e.g. Suite 500), an email address, a phone number, a fax number, and a website URL to be associated with the address.

Address Maintenance eForm (SA) New Cancel Save Submit

Add, Delete, Update, or Reactivate address.

Title:

Select Maintenance Mode:

Address Unique Name:

Address Name:

Entity:

Line 1:

Line 2:

Line 3:

City:

State:

Postal Code:

Country:

Email Address:

Phone:

Fax:

URL:

ShipTo, BillTo:

> Approval

Cancel Save Submit

Required information for adding an address is denoted by the (*) symbol.

- Once all the required fields have been populated, the Approval Flow will appear at the bottom of the screen to show that the eForm will now be routed to the NC eProcurement Help Desk (**NC Help Desk**) for review and approval.
- Click **'Submit'** to request that the NC eProcurement Help Desk reactivate the address' information in the system.
- After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.

- Click **'Proceed'** to view the request. At the bottom of the screen, the Security Administrator may add comments or withdraw the request.

III. Reassigning Transactions

- Security Administrators may have the ability to reassign transactions between users. This feature is particularly helpful when users do not close out their open transactions before leaving an entity or changing an entity and the user must be deleted (see **Section I.c. Deleting a User**).
- There are two groups that a user must have in order to reassign transactions:
 - NC Requisition Reassignment:** Users belonging to this group can reassign Purchase Requisitions between users within their entity.
 - NC Receipt Reassignment (NCAS Only):** Users belonging to this group can reassign Receipts between users within their entity.
- To begin reassigning transactions, Security Administrators must be in Expert View. There is no option to reassign transactions from the Guided Buying view.
- To begin reassigning transactions, select **'Approvable Role Assignments'** from the **'Common Actions'** portlet or from the **'Manage'** menu.

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5. This displays the Approvable Role Assignments page.
6. If the Security Administrator has access to both '**NC Requisition Reassignment**' and '**NC Receipt Reassignment**' groups, they must select which Approvable Type will be reassigned.

Note: The process for reassigning Purchase Requisitions and reassigning Receipts is identical after selecting the Approvable Type from the drop-down.

Approvable Role Assignments

Search for approvable to reassign from one user to another. You can search based on the current owner of the transactions. [More options...](#)

Note: If you experience delays in retrieving search results, retry with a smaller date range.

Approvable Type: Requisition ▼

The options under the 'Approvable Type' drop-down menu are 'Requisition' and 'Receipt.'

7. From this page, Security Administrators can search for transactions to reassign using the necessary search filters.

Approvable Role Assignments

Search for approvable to reassign from one user to another. You can search based on the current owner of the transactions. [More options...](#)

Note: If you experience delays in retrieving search results, retry with a smaller date range.

Approvable Type: Requisition ▼

Search Filters

Current User: ADMIN Requester [select ▼]

Requisition ID:

Date Created: Custom ▼

From: Sat, 6 Jun, 2020 [calendar icon]

To: Sat, 20 Jun, 2020 [calendar icon]

Partitioned Commodity Code (any line item): (select a value) [select ▼]

Status: No Choice ▼

Supplier (any line item): (select a value) [select ▼]

Search Reset

The most common method to reassign transactions is to search for transactions filtered by the current owner of the transactions so as to reassign them to another user.

Additional search filters can be added using the 'Search Options' drop-down selector.

8. After filtering as necessary, click the blue '**Search**' button. This will bring up a list of results below the search filters.
9. To add additional columns to the results table, click the blue grid icon at the top right of the search results.

Note: The blue grid icon will also allow the results to be exported into a Microsoft Excel file.

10. Select the requisitions to reassign using the checkboxes to the left of the Purchase Requisition results.

Note: Multiple requisitions can be reassigned at once.

Search Results

Found 5 Items

| Type | ID | Title | Status | Date Created | Total | Requester | Bypass Approval Flow | Buying Entity | Pass to Budget Officer | Override Fund Exception | FO |
|--------------------------|------------|--|-----------|--------------|-----------------|-----------------|----------------------|---------------|------------------------|-------------------------|----|
| <input type="checkbox"/> | PR11818890 | Paper Towels - NCEP Office - Southeastern Paper - 20200616 - SJD | Submitted | 16 Jun 2020 | \$45.86000 USD | ADMIN Requester | No | | | | |
| <input type="checkbox"/> | PR11818893 | Sweatpants - Steve - Water Heater Dist - 20200616 - SJD | Submitted | 16 Jun 2020 | \$50.00000 USD | ADMIN Requester | No | 13EG | No | No | |
| <input type="checkbox"/> | PR11818894 | Printer Cartridge - NCEP Office - Kyocera - 20200616 - SJD | Submitted | 16 Jun 2020 | \$184.18000 USD | ADMIN Requester | No | 13EG | No | No | |

Reassign

The search results will be based on the entered filters. To view more or different information for each of the results, select the blue grid icon to add or remove columns.

Select which transactions to reassign by selecting the checkbox to the left of the result. Multiple transactions can be selected for reassignment. Once all the necessary transactions have been selected, click the 'Reassign' button.

11. Clicking the 'Reassign' button will display the 'Approvable Roles to Reassign' page.

12. Based on the transactions selected, all approvable roles that can be reassigned will populate on the 'Approvable Roles to Reassign' page, including the approver of the transaction(s).

13. Reassign the necessary roles by selecting the drop down menu under the 'New User' column and searching for the new user who will take over that assignment (e.g. the new Requester or new Preparer).

Notes:

- Security Administrators cannot reassign roles outside of their entity. Security Administrators will be able to see and select users from outside their entity using the 'Current User' filter, but results will not display any approvables to reassign.
- Only reassign the roles necessary. For example, if John Doe has left the entity and his transactions are being reassigned to Jane Smith, the approver may or may not need to be reassigned as well.

14. Click the 'Save' button to reassign the roles.

NC eProcurement Security Administrator

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

Reassign Approvable Roles

Reassign the roles in the selected approvables from the current user to appropriate groups. The Ariba solution does not validate the group membership in the approvable.

permissions to perform the assigned role and is a member of the Less
such as Ship to address, Bill to address, and accounting information

Reassign only the roles necessary using the drop down menu in the 'New User' column.

Approvable Roles to Reassign

| Current User ↑ | Role | Approvable Count | New User |
|---------------------|-----------|------------------|------------------|
| ADMIN No Supervisor | Approver | 1 | (no value) |
| ADMIN Requester | Preparer | 1 | ADMIN Supervisor |
| ADMIN Requester | Requester | 1 | ADMIN Supervisor |

Comment:

Enter comments as necessary and select the 'Save' button to reassign the transactions.

Save

Note: There is no confirmation message to indicate the reassignment process was successful or unsuccessful. Users will be taken back to the 'Approvable Role Assignments' page with their previous search results. To verify that the transaction has been reassigned, view the transaction summary page and verify the reassignment in the 'History' tab.

PR11818894 - Printer Cartridge - NCEP Office - Kyocera - 20200616 - SJD Status: Submitted

Print

Summary Orders Receipts History

Within the history of the transaction, there will be a verification that the reassignment was successful.

History

| Date ↓ | User | Real User | Action | Summary |
|----------------------------|---------------------------------|---------------------------------|---|---|
| Sat, 20 Jun, 2020 3:19 PM | ADMIN Requisition Reassign User | ADMIN Requisition Reassign User | Transferred | PR11818894 was transferred from ADMIN Requester to ADMIN Supervisor. Modified field 'Requester' Comments. |
| Sat, 20 Jun, 2020 3:19 PM | ADMIN Requisition Reassign User | ADMIN Requisition Reassign User | Transferred | PR11818894 was transferred from ADMIN Requester to ADMIN Supervisor. Modified field 'Preparer' Comments. |
| Tue, 16 Jun, 2020 2:37 PM | ADMIN Supervisor | ADMIN Supervisor | Approved | PR11818894 approved. |
| Tue, 16 Jun, 2020 2:36 PM | ADMIN Supervisor | ADMIN Supervisor | Approver Chg | Approver ADMIN No Supervisor added after ADMIN Supervisor. |
| Tue, 16 Jun, 2020 10:41 AM | Budget Integration User | Budget Integration User | Approved | PR11818894 approved. Comments. |
| Tue, 16 Jun, 2020 10:41 AM | ADMIN Requester | ADMIN Requester | Submitted | PR11818894 submitted for approval. |
| Tue, 16 Jun, 2020 10:41 AM | ADMIN Requester | ADMIN Requester | Requisition sent to the external system | PR11818894 : Requisition was successfully sent to the external system. ERP reference number: PR11818894. |

IV. User Maintenance Group Definitions

1. Each user has a unique profile with specific groups that they belong to, which informs what permissions and access that user has within NC eProcurement. The assigned groups are based on upon the individual's job functions and their responsibilities within their entity.
2. Groups determine a user's authority within the system. Each group has a set of permissions associated with it which determine what functionality and information a given user can access within NC eProcurement. Each user must belong to at least one group, however one group often has multiple permissions. Below is a list of available group by entity type and the associated permissions in the group.
3. Groups are divided by entity and should only be selected based on the entity that the user is a part of. In other words, there is an individual **'Purchasing Agent'** group for every entity (DOA Purchasing Agent, DIT Purchasing Agent, DPI Purchasing Agent, etc).

Note: Security Administrators will be able to see all available groups. If a Security Administrator requests access to a group to which they should not belong (e.g. the purchasing agent group for another State entity), the request will be denied by the NC eProcurement Help Desk.

a. Groups for NCAS State Agencies

| Group Name | Group Description | Mapping to group in previous 9r1 version |
|---------------------------------|---|--|
| NC NCAS Basic User | <ul style="list-style-type: none"> • Create requisitions with catalog and non-catalog items • Only see requisitions related to ones they created • Can run reports, add other charges, and update tax information • Create Receipts for orders they created (Desktop receiving) | <i>NCAS Requester</i> |
| NC Catalog Only | <ul style="list-style-type: none"> • Can create requisitions for catalog items only | <i>NCAS Requester – Catalog Only</i> |
| NC No Supervisor | <ul style="list-style-type: none"> • Users who belong in this group are allowed to not have any designated supervisor in their User Profile • Users must have a '9999999' management level | <i>No Supervisor</i> |
| NC Purchasing Agent User | <ul style="list-style-type: none"> • Review and edit requisitions for Collaborative Requisition • Review and edit the requisition approval workflow when they are added as an approver • Access to the bypass approval checkbox | <i>NCAS Purchasing</i> |
| NC Change Cancel PO | <ul style="list-style-type: none"> • Change and Cancel orders created by other users <p><i>Warning: Users in this group may also see an option to 'Force Order' appear. They should not select the 'Force Order' button or the purchase order will need to be recreated</i></p> | <i>NCAS Purchasing</i> |
| NC Close PO | <ul style="list-style-type: none"> • Can close purchase orders | <i>NCAS Purchasing</i> |
| NC Search User | <ul style="list-style-type: none"> • Ability to search all approvables within their entity | |
| NC Edit Approvable | <ul style="list-style-type: none"> • Ability to edit the requisitions during the approval process without requiring re-approval | <i>NCAS Editor</i> |
| NC Tax and Charge Editor | <ul style="list-style-type: none"> • Ability to edit the taxes and charges in a requisition during the approval process | <i>NCAS Editor</i> |

NC eProcurement

Security Administrator

| Group Name | Group Description | Mapping to group in previous 9r1 version |
|-------------------------------------|--|---|
| NC Collaborative Requisition | <ul style="list-style-type: none"> Ability to create Collaborative Requisitions (Enable Collaboration) | NCAS Requester – eQuote |
| NC Collaboration Team | <ul style="list-style-type: none"> Ability to accept proposals from suppliers Ability end collaboration | NCAS Requester – eQuote |
| NC Global Reporting Role | <ul style="list-style-type: none"> Create/edit reporting templates and save them as Public reports for users to run View reporting data from other entities <p><i>Warning: Users in this group may also can see and modify other entities' requisition. Therefore, it is recommended to limit this role to selected users</i></p> | Global Reporting Role NCAS Reporting Role Extended Reporting Role |
| Entity Reporting | <ul style="list-style-type: none"> View and generate reports that contain data that is restricted to the entities listed as purchasing units | |
| NC Reporting Role | <ul style="list-style-type: none"> View and generate reports that contain data that is restricted to what they and their subordinates create | |
| NC Address Maintenance eForm | <ul style="list-style-type: none"> Access to the Address Maintenance eForm | Security Administrator Address eForm Role |
| NC User Maintenance eForm | <ul style="list-style-type: none"> Access to the User Maintenance eForm | Security Administrator User Maintenance eForm |
| NC Requisition Reassignment | <ul style="list-style-type: none"> Reassign a requisition from one user to another user of the same type (requester/approver/preparer) | |
| NC Receipt Reassignment | <ul style="list-style-type: none"> Reassign a receipt from one user to another user of the same type (requester/approver/preparer) | |
| Central Receiver XXX | <ul style="list-style-type: none"> Receive goods/services on behalf of a Central Receiver "Ship To" address in their agency. The NC eProcurement Help Desk must create new Central Receiver "Ship To" Addresses and groups. Central receivers must be assigned the appropriate Group that is mapped to the Central Receiver "Ship To" Address in order to be able to receive on behalf of that address. | Central Receiver |
| NC Receipt Editor | <ul style="list-style-type: none"> Edit a receipt that failed import in NCAS | |
| (Entity-Specific Groups) | <p>Dozens of entity-specific groups exist for use within only that entity. To search for them, type the entity abbreviation (ex: ADMN, COMM, AGRI, CADM, DPS, ...)</p> <ul style="list-style-type: none"> For example, there are unique 'IT Commodity Approver' groups for the Department of Public Safety, the Department of Insurance, the Department of Administration, etc. | Central Receiver Approver |

Cross-Entity permissions: to allow a user to access information for any entity across an entity group (such as DHHS, Commerce, Agriculture, State IT Procurement, P&C or DOA Purchasing), mention it to the help desk in the eForm using the Comments section.

NC eProcurement Security Administrator

List of groups recommended for:

| Profile | Groups recommended |
|-------------------------------|---|
| Requester | NC NCAS Basic User NC Reporting Role <u>Optional:</u> NC Collaborative Requisition |
| Purchasing Agent | NC Purchasing Agent User NC Tax and Charge Editor NC Edit Approvable Entity Reporting Optional: NC Change Cancel PO NC Collaborative Requisition NC Collaboration Team NC No Supervisor NC Receipt Reassignment NC Requisition Reassignment + Any needed entity approval groups* |
| Approver | NC Edit Approvable NC Reporting Role NC Tax and Charge Editor + Any needed entity approval groups* Option: NC Override Budget Officer |
| Security Administrator | NC Address Maintenance eForm Entity Reporting NC Receipt Reassignment NC Requisition Reassignment NC User Maintenance eForm |

* If the user covers multiple entities, please be sure to specify in the eForms each entity they will cover for each group (including approval groups).

b. Groups for EPLite entities (Community Colleges, School Systems-LEA)

| Group Name | Group Description | Mapping to group in previous 9r1 version |
|-------------------------------------|---|--|
| NC EPLite Basic User | <ul style="list-style-type: none"> Create requisitions with catalog and non-catalog items Only see requisitions related to ones they created Can run reports, add other charges, and update tax information For Community College and local school systems (LEAs) | <i>EPLite Requester</i> |
| NC Catalog Only | <ul style="list-style-type: none"> Can create requisitions for catalog items only | <i>EPLite Requester – Catalog Only</i> |
| NC No Supervisor | <ul style="list-style-type: none"> Users who belong in this group are allowed to have no designated supervisor in their User Profile Users must have a '9999999' management level | <i>No Supervisor</i> |
| NC Purchasing Agent User | <ul style="list-style-type: none"> Review and edit requisitions for Collaborative Requisition Review and edit the requisition approval workflow when they are added as an approver Responsible for change/cancel Purchase Order Access to the bypass approval checkbox | <i>EPLite Purchasing</i> |
| NC Search User | <ul style="list-style-type: none"> Ability to search all approvables within their entity | |
| NC Edit Approvable | <ul style="list-style-type: none"> Ability to edit the requisitions during the approval process without requiring re-approval | <i>EPLite editor</i> |
| NC Tax and Charge Editor | <ul style="list-style-type: none"> Ability to edit the taxes and charges in a requisition during the approval process | <i>EPLite Editor</i> |
| NC Collaborative Requisition | <ul style="list-style-type: none"> Ability to create Collaborative Requisitions (Enable Collaboration) | <i>EPLite Requester – eQuote</i> |
| NC Collaboration Team | <ul style="list-style-type: none"> Ability to accept proposals from suppliers Ability to end collaboration | <i>EPLite Requester – eQuote</i> |
| NC Global Reporting Role | <ul style="list-style-type: none"> Create/edit reporting templates and save them as Public reports for users to run View reporting data from other entities <p><i>Warning: Users in this group may also can see and modify other entities' requisition. Therefore, it is recommended to limit this role to selected users</i></p> | <i>Global Reporting Role EPLite Reporting Role Extended Reporting Role</i> |
| Entity Reporting | <ul style="list-style-type: none"> View and generate reports that contain data that is restricted to the entities listed as purchasing units | |
| NC Reporting Role | <ul style="list-style-type: none"> Ability to view and generate reports that contain data that is restricted to what they and their subordinates create | |
| NC Administrator | <ul style="list-style-type: none"> Has permission to view all requisitions and purchase orders created within their entity Receives all email notifications resulting from NC eProcurement transactions (successful purchase order confirmations as well as failure to import messages) | <i>EPLite Administrator</i> |

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Security Administrator

| Group Name | Group Description | Mapping to group in previous 9r1 version |
|-------------------------------------|---|--|
| NC Address Maintenance eForm | <ul style="list-style-type: none"> Access to the Address Maintenance eForm | <i>Security Administrator</i> <i>Address eForm Role</i> |
| NC User Maintenance eForm | <ul style="list-style-type: none"> Access to the User Maintenance eForm | <i>Security Administrator</i> <i>User Maintenance eForm</i> |
| NC Requisition Reassignment | <ul style="list-style-type: none"> Ability to reassign a requisition from one user to another user of the same type (requester/approver/preparer) | |
| (Entity-Specific Groups) | <ul style="list-style-type: none"> Dozens of entity-specific groups exist for use within only that entity. To assign the “Gatekeeper” role, default approver for requisitions, type the entity abbreviation followed with Purchasing Approver. For example, WAKETECH Purchasing Approver. | |

List of groups recommended for:

| Profile | Groups recommended |
|-------------------------------|--|
| Requester | NC EPLite Basic User NC Reporting Role <u>Optional:</u> NC Collaborative Requisition |
| Purchasing Agent | NC Purchasing Agent User NC Edit Approvable Entity Reporting NC Search User <u>Optional:</u> NC Collaborative Requisition NC Collaboration Team NC Administrator NC No Supervisor NC Requisition Reassignment NC Accounting User + Any needed entity approval groups* |
| Approver | NC Edit Approvable NC Reporting Role + Any needed entity approval groups* <u>Optional:</u> NC Search User |
| Security Administrator | NC Address Maintenance eForm Entity Reporting NC Requisition Reassignment |

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| | |
|--|-------------------------------|
| | NC User Maintenance eForm |
| | Optional: NC No Supervisor |

* If the user covers multiple entities, please be sure to specify in the eForms each entity they will cover for each group (including approval groups).

c. Groups for Non-Integrated entities (including DOT, DES, DWS or Office of the Governor, Charter Schools, Local governments)

| Group Name | Group Description | Mapping to group in previous 9r1 version |
|-------------------------------------|--|--|
| NC Non Integrated Basic User | <ul style="list-style-type: none"> Create requisitions with catalog and non-catalog items Only see requisitions related to ones they created Can run reports, add other charges, and update tax information For non-integrated entities (local governments/municipalities) | <i>Non-Integrated Requester</i> |
| NC Catalog Only | <ul style="list-style-type: none"> Can create requisitions for catalog items only | |
| NC No Supervisor | <ul style="list-style-type: none"> Users who belong in this group are allowed to have no designated supervisor in their User Profile Users must have a '9999999' management level | <i>No Supervisor</i> |
| NC Purchasing Agent User | <ul style="list-style-type: none"> Review and edit requisitions for Collaborative Requisition Review and edit the requisition approval workflow when they are added as an approver Responsible for change/cancel Purchase Order Access to the bypass approval checkbox | <i>Non-Integrated Purchasing</i> |
| NC Change Cancel PO | <ul style="list-style-type: none"> Change and Cancel orders created by other users <i>Warning: Users in this group may also see an option to 'Force Order' appear. They should not select the 'Force Order' button or the purchase order will need to be recreated</i> | <i>NCAS Purchasing</i> |
| NC Search User | <ul style="list-style-type: none"> Ability to search all approvable within their entity | |
| NC Edit Approvable | <ul style="list-style-type: none"> Ability to edit the requisitions during the approval process without requiring re-approval | <i>Non-Integrated editor</i> |
| NC Collaborative Requisition | <ul style="list-style-type: none"> Ability to create Collaborative Requisitions (Enable Collaboration) | |
| NC Collaboration Team | <ul style="list-style-type: none"> Ability to accept proposals from suppliers Ability to end collaboration | |
| NC Global Reporting Role | <ul style="list-style-type: none"> Create/edit reporting templates and save them as Public reports for users to run View reporting data from other entities | |
| NC Administrator | <ul style="list-style-type: none"> Has permission to view all requisitions and purchase orders created within their entity | |

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Security Administrator

| Group Name | Group Description | Mapping to group in previous 9r1 version |
|----------------------------------|---|---|
| | <ul style="list-style-type: none"> Receives all email notifications resulting from NC eProcurement transactions (successful purchase order confirmations as well as failure to import messages) | |
| NC Close PO | <ul style="list-style-type: none"> Ability to close purchase orders For Division of Employment Security and Division of Workforce Solution only | Non-Integrated Requester |
| NC DOT Basic User | <ul style="list-style-type: none"> Ability to create requisitions For NC Department of Transportation only | |
| NC Non Integrated Users | <ul style="list-style-type: none"> Ability to see the Legacy Document ID Field | |
| NC Address Maintenance eForm | <ul style="list-style-type: none"> Access to the Address Maintenance eForm | Address eForm Role Security Administrator |
| NC User Maintenance eForm | <ul style="list-style-type: none"> Access to the User Maintenance eForm | User Maintenance eForm |
| NC Accounting Users | <ul style="list-style-type: none"> Ability to see the Account Code field | |
| NC Special Non Integrated Users | <ul style="list-style-type: none"> Ability for users to see the Bid Number and OpenBudget (OpenBook) fields in EPLite Realm | |
| NC OpenBook Non Integrated Users | <ul style="list-style-type: none"> Ability for users to see the OpenBudget (OpenBook) fields in EPLite Realm | |
| NC Requisition Reassignment | <ul style="list-style-type: none"> Ability to reassign a requisition from one user to another user of the same type (requester/approver/preparer) | |
| NC Receipt Reassignment | <ul style="list-style-type: none"> Ability to reassign a receipt from one user to another user of the same type (requester/approver/preparer) | |
| NC Global Reporting Role | <ul style="list-style-type: none"> Create/edit reporting templates and save them as Public reports for users to run View reporting data from other entities <p><i>Warning: Users in this group may also can see and modify other entities' requisition. Therefore, it is recommended to limit this role to selected users</i></p> | Global Reporting Role EPLite Reporting Role Extended Reporting Role |
| Entity Reporting | <ul style="list-style-type: none"> View and generate reports that contain data that is restricted to the entities listed as purchasing units | |
| NC Reporting Role | <ul style="list-style-type: none"> Ability to view and generate reports that contain data that is restricted to what they and their subordinates create | |
| (Entity-Specific Groups) | <ul style="list-style-type: none"> Dozens of entity-specific groups exist for use within only that entity. For example, there are unique 'Purchasing Approver' groups for Bladen Community College, Central Piedmont Community College, Haywood County Schools, etc. | |

NC eProcurement

Security Administrator

List of groups recommended for:

| Profile | Groups recommended |
|-------------------------------|---|
| Requester | NC Non Integrated Basic User NC Reporting Role <u>Optional:</u> NC Collaborative Requisition |
| Purchasing Agent | NC Purchasing Agent User NC Edit Approvable Entity Reporting NC Search User Optional: NC Collaborative Requisition NC Collaboration Team NC Administrator NC No Supervisor NC Requisition Reassignment NC Special Non Integrated Users NC Close PO (for entities DES and DWS only) + Any needed entity approval groups* |
| Approver | NC Edit Approvable NC Reporting Role + Any needed entity approval groups* Optional: NC Search User NC Close PO (for entities DES and DWS only) |
| Security Administrator | NC Address Maintenance eForm Entity Reporting NC Requisition Reassignment NC User Maintenance eForm Optional: NC No Supervisor |